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ABSTRACT

This Personalized Activity Kit presents a new dimension to staff evaluation. Staff appraisal becomes a procedure that promotes the human and professional growth of staff members. An alternative approach to implementing management by objectives in a large school system is also suggested. Finally, there is a summary of the management role, with emphasis placed on the qualities of successful managers. (Author/IRT)

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# A SCHOOL IMPROVEMENT - ACCOUNTABILITY PROCESS KIT

## PAK #4.5 - COACHING AND APPRAISING STAFF PERFORMANCE

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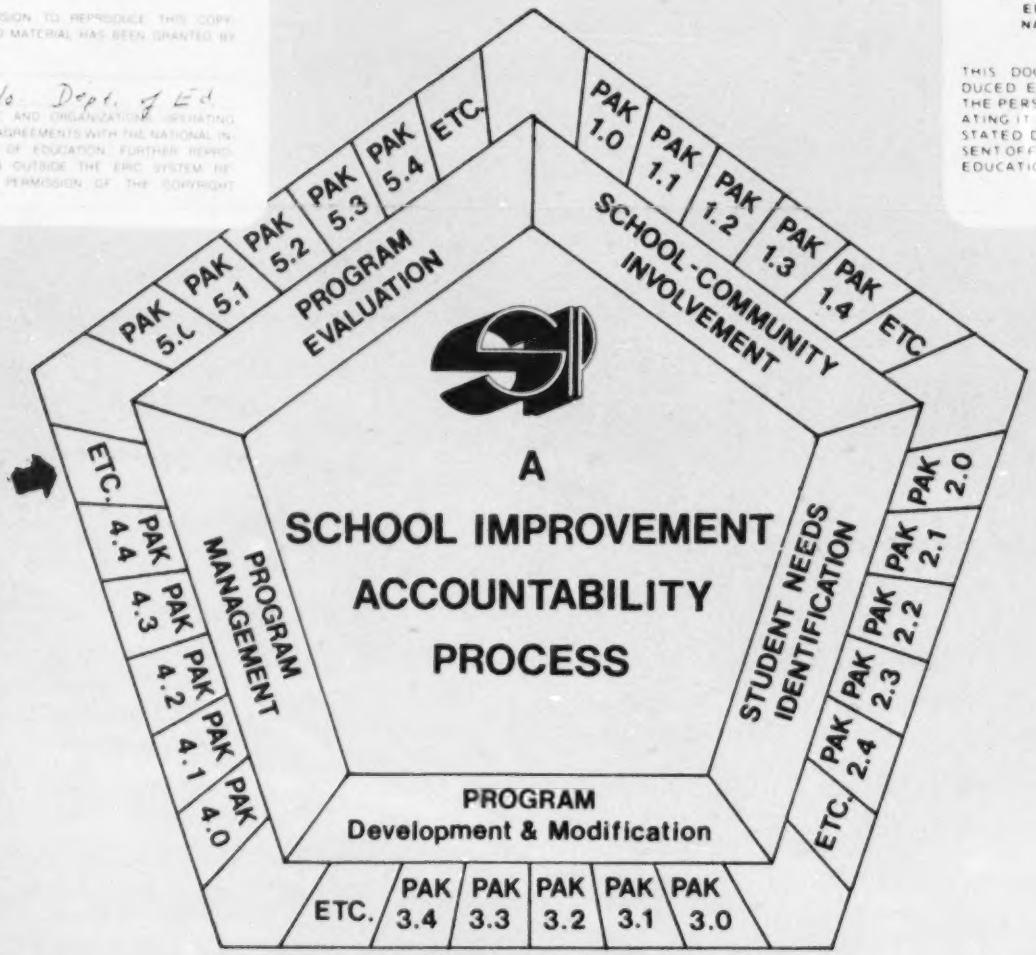


Personalized Activity Kit (PAK) for use as;

- Individualized Study Guide
- Small Group Study Guide
- Workshop Facilitator's Guide

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A SCHOOL IMPROVEMENT - ACCOUNTABILITY PROCESS KIT

PAK #4.5 COACHING AND APPRAISING STAFF PERFORMANCE

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# COACHING AND APPRAISING STAFF PERFORMANCE

## Purpose:

The purpose of this PAK is to present a new dimension to staff evaluation (appraisal). Staff appraisal becomes a procedure that promotes the human and professional growth of staff members. An alternative approach to implementing MBO in a large school system is also suggested. Finally, there is a summary not only for this PAK, but also for the broad program management function.

## Management by Exception and Coaching

Traditionally, many school administrators have attempted to keep track of all their staff. With the growing size and complexity of staffs and work to be done, this is no longer possible. Management by exception is a principle that can be simply stated. As long as the individual's progress report indicates he is doing a good job, give him a pat on the back and let him alone. Remember that the individual's progress report is keyed to achievement of mutually agreed-upon objectives. These objectives have already been checked for consistency with organizational goals and needs. This relationship keeps management-by-objectives dynamic rather than static.

Identify the individual who is not performing up to standard. Hold a coaching session to find out why his performance has slipped below the minimum acceptable level. Allow him to make honest mistakes, but use these as a basis for future coaching sessions. Explore with him such questions as:

- Are the objectives realistic? (Joint responsibility)
- Does he know what is expected of him? (Superior's responsibility)
- Is the superior doing his part to help the subordinate: (Superior's responsibility)
- Does he lack skills and, therefore, need training? (Joint responsibility)
- Is he overloaded (organizational barriers)? (Superior's responsibility)
- Have high-level decisions vitally affecting his job been communicated to him? (Superior's responsibility)
- Does he lack motivation? (Subordinate's responsibility)
- Does he have personal and/or physical problems which can be handled so as to help him regain his former level of productivity? (Joint responsibility)

The new manager knows that the degree and pace of learning by his subordinates are a direct measure of the manager's delegation of responsibility and authority. The manager's performance is dependent upon the collective results of his subordinates. The manager knows his job is to produce results, not add status or prestige (which are by-products of results) to the organization.

It is also important to identify the individual who is surpassing the maximum acceptable standard of performance. There are two major reasons for this:

- What strategies is he using that might be adopted by others?
- Is this person working at a level far below his potential? Should he be promoted? (Under-utilization of abilities is almost a "criminal offense" within an organization.)

Records should be kept of all coaching sessions with a copy sent to the individual concerned. Pertinent information should include: date, place and time; general content of discussion; specific problems identified; solutions agreed upon; and who has the responsibility for the solutions. At subsequent coaching sessions, improvement can be noted by comparing records.

Successful coaching sessions depend upon organizational and individual managerial commitment to the following principles:

- *Discipline is a learning (behavior changing) process rather than one of punishment or retribution.*
- *Prompt feedback is more effective in changing behavior than an accumulation or "intensity" of feedback.*
- *Opportunity for self-evaluation is of greater value than the superior's feedback.*
- *Annual performance reviews become cumulative through the coaching process and, therefore, contain no surprises for the subordinate.*

## Annual Perfcrmance Appraisal

There are four commonly used performance appraisal or measurement techniques. One of these involves the use of a personality traits rating scale. The items deal with traits such as good grooming, being punctual, exhibiting good working relationships with others, and practicing good work habits. Recent research reveals this method to be the weakest one because:

- Personality traits are not as important as managerial style.
- Personality traits are not directly related to organizational goals and to the individual's achievement of objectives related to those goals.

Another method is called man-to-man ranking where one individual's performance is compared with another's. The same weakness exists here - no direct relationship to organizational goals. The first individual may produce an amazing amount of very high quality work. Such work may be counter-productive because the individual's goals are diametrically opposed to those of the organization and, therefore, the work he has done has not contributed to organizational results. The second individual may produce an above average amount of high quality work which adds to organizational results. Yet, in this instance, the first individual would receive a much higher rating.

A third approach is the use of a scaled master list of managerial functions. Items include such factors as: meets deadlines; shows planning and organizational ability; performs well under stress; has problem solving ability, communicates well; and shows initiative. While it is true that these competencies are necessary within an organization, this type of instrument, in and of itself, still does not answer the questions --

DID HE GET HIS WORK DONE?

and

HOW WELL DID HE DO IT?

George Odiorne suggests a fourth alternative - a mixture of annual performance appraisal (which results in objective setting for the next year) and potential review. A Performance Appraisal (like a coaching session) should provide the subordinate with the opportunity to review his performance over the past year and to identify needed improvements (improved objectives) for better achievement during the coming year. This is done in dialog form with the superior.

Once the individual's improved objectives have been mutually established, then the conference should move into a review of the individual's potential. Odiorne identifies six major factors of potential:

- *Performance on current and past jobs.*
- *Native intelligence, aptitude, skills and recent training.*
- *Interests and desires.*
- *Relative scarcity or oversupply of candidates.*
- *Future availability for promotion.*
- *Personal qualifications inventory*

In conducting the Potential Review part of the conference, keep performance discussions out of it. Concentrate on these do's and don'ts:

- *Don't discuss his personality, especially weaknesses over which he has no control (e.g. stuttering.) Amateur psychology cannot change a person's personality.*
- *Cite specific changes he can make to enlarge his potential (e.g. learn more about Program-Oriented Budgeting.)*
- *Don't make promises you can't keep. If you make one, keep it.*
- *Don't compare his potential with another's.*
- *Be honest and realistic.*
- *End on a positive note. Always return to present performance and the need to do a good job for the organization.*

By combining these approaches - Performance Appraisal and Potential Review - information is drawn from a variety of sources. This lessens the chances for biased, subjective ratings. Of course, a full report should be written and a copy given to the subordinate. Provisions for a review process should be established to handle situations where an actual personality clash exists or where the subordinate feels he has been treated unfairly.

Regardless of the appraisal method used there are common defects in all of them. There is a tendency to rate higher (called the halo effect) due to:

- *Individual's past record and superior's short memory of recent blunders.*
- *Compatability with the superior.*
- *Individual's one big recent success despite past record of poor performance.*
- *Individual possesses the same weaknesses as his superior, creating a blind-spot effect.*
- *Individual has outstanding paper credentials which impress superior.*
- *Individual has made no complaints; therefore, he has not created any problems for the superior.*

There is also the tendency to rate lower (called the horns effect) due to:

- *Superior is a perfectionist and sets too high expectations. (He needs a coaching session with his superior.)*
- *Individual argues with superior - he is contrary.*
- *Individual is an odd-ball, a non-conformist according to the superior's standards.*
- *Individual may be doing exceptionally good work but is a member of a weak team.*
- *Individual runs around with the "wrong crowd" creating a guilt-by-association effect in the superior's mind.*
- *Superior tends to remember recent blunders.*
- *Individual does not have the personality traits the superior thinks he should have.*
- *Individual is occupying the superior's former job, creating a "self-comparison effect" by the latter.*

If raters are aware of the halo and horns effects, then they will usually try to make more objective judgments. At any rate a procedure which relates directly to the individual's contribution to organizational results is more likely to coincide with the basic principle -

ORGANIZATIONAL DEVELOPMENT IS DEPENDENT ON STAFF DEVELOPMENT.

## An Alternative Approach to Implementing MBO

Up to this point, the #4 series of PAKs has addressed itself to the staff objectives of individual staff members as these relate to district goals and priority student needs. This approach is very manageable in smaller districts. Larger districts may wish to consider suggested alternative in terms of making MBO more practical and manageable and also in terms of developing management teams within the district.

Once the district-wide revised student goals statement has been adopted by the local board and priority or critical student needs have been identified, the superintendent should communicate to his staff those major needs that will receive special attention and special management concern for the school year (or until these needs are met.) At the building level the principal and faculty should analyze carefully each priority area within their building. This will help the professional staff to determine if their building is contributing to a priority need identified at the district level.

Some priority needs will require a major effort by some schools, but not by others. For example, a priority need to decrease the dropout rates may be of higher importance to secondary schools than to elementary schools. At the elementary level there may be a priority need for preventive measures. A priority need due to low achievement in basic learning skills may be a district-wide problem, but it will require more specific attention in some buildings at the elementary level. This does not infer that basic learning skills and study habits are not important at the secondary level.

The staff of each building should identify priority need areas that exist in their building and that the staff should be working cooperatively to solve. Then the staff should prepare written building objectives which specify what is to be accomplished at the building level to meet these needs. These building-level staff objectives should be specific and should be expressed in outcome-oriented, measureable terms.

At the building level, the staff should limit its major, collective staff objectives to fewer than ten. Not all outcomes of the building program will be written out as staff objectives - only those priority needs for that building. When a staff is beginning to use staff objectives at the building level, it is probably best to adopt about three objectives. In succeeding years, the staff can adopt and manage effectively a greater number of staff objectives.

The central office staff should review the staff objectives prepared by the staff of each building to be sure that no building has ignored a priority need in which it is particularly deficient. If a building is contributing to a specific high level deficiency, the central office staff should attempt to persuade the principal and faculty to include this objective. As a general rule, objectives should not be imposed upon a building by the central office. Only those staff objectives that have the commitment and concern of the principal and faculty have the best chance for achievement. Further, the central office staff should see that the needed resources are available. The central office must give the necessary support and commitment at the district level so that the individual buildings have an optimal chance to achieve their staff objectives.

Once the central office has approved the staff objectives of each building, the district will have attained a results-oriented management procedure that applies to each building rather than to specific individuals. The staff has committed itself to measureable outcomes, and the central office has committed itself to certain supportive activities.

Remember that the staff objectives state what has to be done. Now is the time for the staff in each building to decide how the objectives are to be achieved. This is the planning phase, similar to the procedure used in PAK #4.4. It is vital that all faculty members involved in achieving the staff objectives participate in the planning and in suggesting alternative ways for reaching specific outcomes.

The work described previously should be finished prior to the beginning of the new school year. This enables the plan to be put into action at the first part of the school year, and special efforts to manage for specific outcomes can begin operation during the year. There should be regular monitoring of progress throughout the school year.

One way to monitor progress is to hold monthly management review conferences. These conferences are called by the superintendent or his designated representative. On a monthly basis, the principal and selected staff members discuss their progress with central office representatives. These conferences provide opportunities for open dialogue centered around problems that require coordination and cooperation throughout the district. For example, if inadequate central office support is not being provided, the management review gives the principal an opportunity to express this concern and solicit understanding and support.

These management review conferences can be a most productive aspect of the entire MBO procedure. These conferences bring about coordination, communication and cooperative support among all elements of a large, complex school system. The superintendent can determine how well the building staff is meeting its commitments to him. He can also provide the necessary support and understanding so that staff objectives can be achieved.

At the end of the year an evaluation at the building level must be made to determine how well the staff has met its objectives. Evaluation makes it possible for the staff to identify program weaknesses and to determine how more effective team work can be gained during the next school year. This final step is the end of one MBO cycle and the beginning of a new one for the new school year.

This approach to MBO raises one important question. For those staff objectives that are written for the building as a whole rather than the individual, how can the principal effectively appraise the performance of individual staff members in contributing to the accomplishment of the objective?

Several approaches have been suggested in this series of PAKs: observation records, records of coaching sessions, self-evaluation, personal growth plans, annual performance reviews. In order to keep appraisal as objective as possible, the use of a variety of methods is recommended.

MBO:

- *provides systematic method for solving problems.*
- *allows for increasingly higher levels of achievement.*
- *is democratic in the best traditions of involving professional colleagues in participatory (team) management.*
- *provides a structure for faculty input into the decision-making process.*
- *keeps staff working toward the same targets.*

## SUMMARY

The successful manager:

- Clarifies common objectives for his whole unit.
- Sets objectives high enough to challenge individual staff members.
- Shapes clearly his unit's objectives into a fit with those of the larger unit.
- Makes policies as guides to action rather than waiting for results and then issuing ad hoc judgments in correction.
- Is aware of what program his subordinate plans to follow to achieve his objectives. He does look critically at each objective and the plan for its achievement.
- Adds his own and higher management's known needs to his subordinates' programs.
- Recognizes the very real obstacles likely to hinder the subordinate in achieving his objectives, including the numerous emergency or routine duties which are time-consuming.
- Thinks through and acts upon what he must do to help his subordinates succeed.
- Sets intermediate target dates or deadlines so as to measure the progress of the subordinate.
- Introduces new ideas from outside the organization. The manager encourages his subordinates to do so, so that the status quo cannot be maintained.
- Permits subordinates to scrap less important objectives when more important ones become apparent.
- Reinforces successful behavior or corrects unsuccessful behavior.

The successful manager:

- Does not use prior results as a creative basis for finding new and unusual combinations.
- Does not overload individuals with inappropriate or impossible goals.

- Does not allow two or more individuals to believe themselves responsible for doing exactly the same things. The manager knows that having one responsible party is better.
- Does not stress working methods instead of clarifying individual areas of responsibility.
- Does not emphasize tacitly that pleasing him is more important than achieving job objectives.
- Does not ignore new objectives or ideas suggested by his subordinates and impose only those he deems suitable.
- Does not remain rigid about scrapping objectives proven to be unfeasible, irrelevant or impossible.

PRIME CRITERIA FOR SUCCESS:

- *ability to organize*
- *ability to get results*
- *ability to adapt to changing circumstances*

The successful manager does NOT allow himself to fall into these traps:

- "BEAN-COUNTER."

  *This is an authoritarian manager who is totally concerned with input control. Reports flow up, edicts come down. His procedures get in the way of effective output. He has learned how to control signatures and communications, and he doesn't even blink while he's doing it. He totally kills enthusiasm and innovation.*

- "I-AM-THE-BOSS."

  *This is the excessively aggressive manager who ignores everything but results. He is exclusively action-oriented, and human beings do not count.*

- "BUSY-BUSY."

  *This is the activity manager who has allowed himself and his staff to lose sight of organizational objectives. His name is legion. His objective is activity above all else - even human factors or agency goals. He generates resistance and uses great rhetoric and logic to defend that he is doing. His rule is - Do it my way, results be darned.*

- "PAPER-HANGER."

  *This manager spends all his time writing memos and other trivia which he sends to the central office. He never gets around to filing reports of results because he's too busy with paper activities to have any results to report.*

George Odiorne describes an administrator as a person who:

- *Makes decisions (control).*
- *Adapts to his environment for survival.*
- *Preserves the status quo.*

He describes a manager in education as an Education Leader, a Manager of Change. This person is one who:

- *Operates a decision-making system (plan, organize, coordinate).*
- *Relates to his environment to plan needed changes.*
- *Brings about planned change.*

Odiorne's conclusion is that we have a critical surplus of administrators and a crucial shortage of managers.

How right is he in this conclusion?

| PITFALL | SYMPTOMS | DESCRIPTION | TREATMENT |
|---|---|---|---|
| (1)<br>Busy! Busy! | (A) Never get around to taking time to get started.<br><br>(B) Feel rushed in interviews with employees.<br><br>(C) Feel like you have more important things to do. | It is a common occurrence for a manager to feel that other things are more important. But ask yourself what is more important than getting the best performance from your personnel. | (a) Better scheduling of your time - set up blocks of time to work on the program.<br><br>(b) Assign someone else to handle the problems while you are working on the program. |
| (2)<br>You change -<br>I won't. | (A) Telling employees to change. (Telling implies you are using old system.)<br><br>(B) No (or little) cooperation from employees. | You can talk a good story about the system as it involves the individual, but you must also practice it. | (a) Don't tell - ask.<br><br>(b) Listen and allow the employee to respond.<br><br>(c) Let the employee carry most of the burden of the interview. |
| (3)<br>Perfectionist | (A) Endless hours of discussions, rehashing and reworking.<br><br>(B) Hung up on small parts of job and expected results. | Performance planning and review is not a foolproof system. It is at best an improvement over old-type systems. Going into infinite detail will strangle the program. | (a) Accept fairly broad generalities.<br><br>(b) Don't expect a perfect system the first time around.<br><br>(c) Don't let yourself be dragged into detail pits - stay on top. |

| PITFALL | SYMPTOMS | DESCRIPTION | TREATMENT |
|---|---|---|---|
| (4)<br>*Once* and for *always* | (A) Never give in on any points.<br><br>(B) Once individual plan is set up, never change it.<br><br>(C) Hold each person to the letter of the plan. | Performance plans must be flexible. Conditions change and so should the plan. No change can mean no improvement. | (a) Agree to reasonable changes.<br><br>(b) Encourage employees to suggest changes in the plan.<br><br>(c) Think about conditions that might change the plan. |
| (5)<br>Copy Cat | (A) Always looking at other plans to copy so you won't have to think it through yourself.<br><br>(B) Trying to make as many plans fit a group pattern so they are all alike. | Performance plans will have many similar elements, but the basic expected results will almost always be different. | (a) Regard each plan as separate and distinct<br><br>(b) Avoid referring to other plans except as a general guide.<br><br>(c) Let the employee develop his own plan- this will assure its originality. |
| (6)<br>That's the system I've always used. | (A) Nothing new to you - you already know how it works.<br><br>(B) No one can tell you about the program. | Many managers feel they already know how the system works. In fact, they don't! Some elements are a part of most managers' jobs - most are new. | (a) Listen, learn, then decide.<br><br>(b) Search for parts and ideas which may be new to you. |

| PITFALL | SYMPTOMS | DESCRIPTION | TREATMENT |
|---|---|---|---|
| (7)<br>Definitions<br>Hang-up | (A) Employees keep asking for definitions and explanations of what you mean when you use certain words, e.g. expected results.<br><br>(B) Doubts about definitions begin to creep into your thinking. You try your hand at redefining the titles. | Getting language which everyone agrees to and understands is almost impossible. Attempting to define points to satisfy all people will create distrust of the system. | (a) Explain concepts; don't try to define expressions - use examples instead.<br><br>(b) Let employee define it any way he prefers as long as you get the end result. An expected result by any title is an expected result. |
| (8)<br>Too Hard to Understand | (A) Employees can't get it through their heads what you're trying to do.<br><br>(B) You get hung up on specific parts of the program. | Reluctance and resistance are often manifested by playing dumb. People who don't want to learn can find reasons not to learn. Change is the order of the day. | (a) Recognize when employees are resisting change.<br><br>(b) Confront those who do not want to change. Tell them you understand how they feel. Go through each of the stages in asking them to change over to the new system. |

# MANAGING BY GOALS AND RESULTS
(Summary of Do's and Don't for Effective Application)

| DO | DON'T |
|---|---|
| (1) Adapt your goals directly to enterprise purpose and strategic objectives. | (1) Allow goals to remain in vague, loose terms. |
| (2) Quantify and target date your goals where possible. | (2) Assume that goals support upper level requirements. |
| (3) Put goals into clear and specific written form. | (3) Submit goals that lack criteria for measurement. |
| (4) Keep the number of goal statements to a few highly relevant key result areas. | (4) Obscure top priority goals with excessive statements of "motherhood". |
| (5) Test your goals for achievability stretch and reach. | (5) Cushion or hedge against accountability for results. |
| (6) Adjust your goals to the reality of available resources. | (6) Lift your head into the clouds with irrational goals. |
| (7) Modify your goals to meet changing conditions. | (7) "Bash on" with obsolete goals. |
| (8) Establish reliable performance reports that measure progress and variance toward goal accomplishment. | (8) Rely on instinct or crude benchmarks to measure performance to goals. |
| (9) Communicate your goals to subordinates with assignment to prepare supporting goals. | (9) Demand that subordinates do your goal setting for you. |
| (10) Review your goals with counterparts in the organization to assure mutual support. | (10) Fall into the trap of being a one-man band in goal setting. |

## NEW MANAGERIAL SKILLS

With the growing complexity of the American educational enterprise, it is becoming increasingly apparent to the visionaries in our field that certain skills and tools must be available to local districts. Some of these include:

- *Communication, Group Dynamics and Human Relations Skills - including problem-solving, consensus taking, decision making, conflict resolution and confrontation strategies.*
- *Change Agent Skills - e.g. The Havelock Model.*
- *Systems Approach to Educational Planning and Management, Program Evaluation Review Technique (PERT) and Gantt Charts.*
- *Program Oriented Budgeting*
- *Designing and Using Management Information Systems - manual or automated.*
- *Measurement, Evaluation and Empirical Research.*
- *Statistical Analysis for Managerial Decisions.*

The superintendent will need to be a fairly good generalist in most of these areas so that he can adequately assess the work performance of his staff. In other areas, such as decision-making and the use of management information in this process, he must be a specialist.

In large districts, we are already beginning to see the dawn of specialists within the management field. But what of the smaller districts? Some of these skills will need to be immediately available at the local district level; others can be provided at the BOCS level.

There is also the alternative of the committed individual within the profession who recognizes an area of interest and is willing to retrain himself. As higher education becomes increasingly aware of these managerial needs, there will be ample opportunity for preservice and inservice training.

PAK #
(Please fill in number)

## PAK CRITIQUE FORM

Please give your assessment and comments on the following:

| PROGRAM ELEMENT | OUT-STANDING | VERY GOOD | FAIR | POOR | VERY POOR | COMMENTS |
|---|---|---|---|---|---|---|
| 1. The quality & relevance of the subject matter. | | | | | | |
| 2. The appropriateness and usefulness of the instructional materials. | | | | | | |
| 3. The timing or sequencing of the various items presented. | | | | | | |
| 4. The directing and assistance given on the exercise. | | | | | | |

Other comments or suggestions for improving this PAK:

If this PAK was used as part of a WORKSHOP training session, then please also complete the following:

| PROGRAM ELEMENT | OUT-STANDING | VERY GOOD | FAIR | POOR | VERY POOR | COMMENTS |
|---|---|---|---|---|---|---|
| 5. The deployment, grouping or planned interaction of the participants. | | | | | | |
| 6. The productivity and/or usefulness of the individual work session(s). | | | | | | |
| 7. The comments or assistance given to you on your selected problem. | | | | | | |